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# OZ IT

## Australian IT Bulletin

U.S. Commercial Service, Australia

# Welcome

### To the Australian IT Bulletin

This monthly publication contains useful business intelligence on the Australian IT market.

In this issue, you'll find information on:

- IT Developments in Australia,
- Update on Wages in IT market,
- Broadband Uptake,
- and much, much more!

For further information on the articles in this publication or on any aspect of the Australian IT market, please contact:

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## Local Contact Centers To Automate

According to a recent study by callcentres.net, the proportion of calls answered by human operators in local contact centers fell from 80 percent in 2001 to 64 percent in 2002. By the end of 2003, this share is expected to fall to 55 percent.

According to the 2003 Australia Call Centre Benchmark Study, more transactions are likely to be handled automatically without manual intervention, as 86 percent of contact centers upgrade or invest in new technologies such as Internet-based services, email and voice recognition. In the next 12 months, 25 percent of the respondents to the study plan to upgrade technologies including PABX systems, 22 percent plan to invest in interactive voice response systems, and 27 percent will install or upgrade their Customer Relationship Management (CRM) solutions.

Twenty-one percent of call centers will purchase workforce management software, 13 percent will invest in voice-only call recording systems, and 10 percent will invest in voice and data recording software.

Voice recognition still remains a gray area, with only five percent of respondents reporting they would invest in speech recognition solutions. Furthermore, only five percent said they had a fully integrated system that managed phone, email, fax, web chat, speech recognition, and SMS interactions with customers. Eighty-four percent of operators identified integration as an important facet of contact center operations, and 67 percent will either fully or partially integrate technologies in the next 12 months.

The next 12 months should be a good time for U.S. vendors to consider entry into the local market. Please contact [duncan.archibald@mail.doc.gov](mailto:duncan.archibald@mail.doc.gov) for information on local integrators of contact center solutions, and/or to discuss strategies to enter the local market.

## Did You Know?

There are approximately 3,900 contact centers located in Australia employing about 225,000 people.

## Perot Is The Go With Local Company

U.S.-based vendor Perot Systems has just won a US\$15 million deal to provide software to the Medical Benefits Fund (MBF) in Australia. This agreement provides Perot with its first introduction to the local market. The deal, which has just been announced, includes a software license, and a five-year master service agreement. Perot is one of the dominant providers of software and services to U.S. healthcare providers, insurers and other health-related organizations.

## Storage News

Approximately 14 percent of all Asia-Pacific data capacity resides in Australia. South Korea leads with 26 percent, while China has 19 percent. The META Group has stated that spending on storage occupies 15 percent of a typical IT budget. IDC has also noted that the combined Australian and New Zealand storage markets will reach US\$1.2 billion by 2006. At present, the Asia-Pacific storage market is worth US\$1.8 billion, growing only 2.7 percent from 2001.

Australia's high percent of capacity vis-à-vis the remainder of Asia-Pac has been attributed to the faster uptake of Storage Area Networks (SANs) and related technologies, as well as the level of well-developed networked storage systems.

## Did You Know? – Printer Cartridges

Australia uses more than 18 million printer, fax and copier cartridges, including compatibles and OEMs per year, generating 5,000 tons of waste.

OEMs have slowly been regaining market share. According to IDS, Inkjet compatibles steadily lost market share in 2002, dropping

from 20.6 per cent of the market in Q1 2002 to 17.5 per cent in Q4 2002. Laser toner compatibles also lost ground holding 39 percent of the market in Q1 2002 and falling to 36 percent in Q4 2002.

### Out of Contract And On The Books

Local IT contractors are feeling the heat. Technology salaries declined in real terms in the year ending April 2003 with growth of 3.1 percent, below the increase in average wages of 4.7 percent for the same period. A recent survey by the Australian Computer Society found that 24 percent of contractors had lowered wages to stay in work. Almost 50 percent had been forced to keep their wages at the same level, while only 30 percent of those surveyed had reported wage increases. All of this seems to add up to, that organizations with large numbers of employees have told their contractors "if you want permanent work here it is, and this is your wage". Hourly rates have halved over the last two years and vary between US\$29.50 to US\$66 per hour. The average call-out wage is US\$49.50 per hour. Project Managers can expect US\$59.5 per hour, and programmer/analysts US\$35 per hour.

All in all, this is a pretty clear indication that the local IT market has shrunk over the last two years.

### Salaries By Job Function

(all figures in US\$)

General Management	\$97,168
Sales & Marketing	\$85,272
IT Management	\$73,582
Consulting	\$71,940
Project Management	\$68,618
Research & Development	\$62,690
Database Administrator	\$61,329
Systems Management	\$59,710
Project Leader	\$57,607
Research & Teaching	\$49,234
Programmer/Analyst	\$49,234
Analysis & Testing	\$48,502
LAN Manager	\$46,761
Computer Support	\$42,507
Teaching/Training Only	\$42,290

Source: Australian Computer Society

### Conference/Trade Shows

#### 25<sup>th</sup> International Conference of Data Protection and Privacy Commissioners

Australia's Privacy Commissioner, Mr Malcolm Crompton, will host the 25<sup>th</sup> International Conference. This year's conference theme is entitled "Practical Privacy for People, Government and Business"

Date: September 10-12, 2003  
Location: Sydney Exhibition Centre  
Organizers: Tour Hosts Conference & Exhibition Organizers  
Frequency: One-off  
Tel: 61 2 9248 0800  
Fax: 61 2 9248 0894  
[www.privacyconference2003.org](http://www.privacyconference2003.org)

## **Broadband In Perspective**

The federal government is constantly touting figures for local broadband uptake. Recent government analysis claimed that broadband subscribers had doubled to the 12 months ending March, 2003, to reach 423,600 broadband subscribers.

Local telco analyst, Paul Budde, paints a more sobering picture. He claims that only seven percent of Internet-using households in Australia had broadband access. By contrast, 85 percent of all Korean households with Internet access had broadband access, while 65 percent of Hong Kong residence with Internet access utilized broadband services. In Europe, 21 percent of UK residence with Internet access used broadband services, and 39 percent of French residences used broadband services. The U.S. stands at 35 percent.

Much of the problem with Australian broadband services lies with the fact that downloads are not unlimited, but rather are charged at very high rates, making broadband access a costly option at present.

Australia is ranked behind Estonia in the worldwide broadband league tables.

## **Distys/Integrators of Wireless Solutions**

### **Ayr Data Systems Pty Ltd**

28 Bridge Street  
Pymble NSW 2073

Tel: 61 2 9488 3155

Fax: 61 2 9488 3177

[www.ayrdata.com.au](http://www.ayrdata.com.au)

Michael Porter - Managing Director  
[mporter@bigpond.net.au](mailto:mporter@bigpond.net.au)

Ayr Data is a leading integrator of networked wireless solutions, with particular skill set in providing handheld solutions to the barcoding and stock/inventory solutions market.

### **Dovetail Distribution Pty Ltd**

PO Box 40  
Pymble NSW 2073

Tel: 61 2 9418 5888

Fax 61 8 9418 5889

[www.dovetail.com.au](http://www.dovetail.com.au)

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Dovetail is a value-added distributor of networking and wireless communication products.

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## Local Wireless Solutions Distributors

[Advanced Portable Technologies Pty Ltd](#)

[ATI Australia Pty Ltd](#)

[Comtel Technologies Pty Ltd](#)

[Datanet Pty Ltd](#)

[Integrity Data Systems Pty Ltd](#)

## Local Arraycomm Spin-Off Bursting at the Seams in Oz

In 2002, Personal Broadband Australia, a subsidiary of ArrayComm unveiled an US\$12.5 million consortium for pre-commercial deployment of the iBurst system in Australia, including mobile operator Vodafone Australia, leading Australian ISP OzEmail, telecommunications project manager TCI, and base station site owner Crown Castle Australia. PSB later added network equipment provider CommWorks, a 3Com Company, to the CKW-led consortium.

In November, CKW began the pre-commercial rollout of the system in Sydney, which will scale to 12 radio communications base stations, providing coverage to over 150 square kilometers (approximately 60 square miles) and approximately 500 trial users.

PBS Australia will take the system into full-scale commercial service later this year and begin expansion into other Australian capital cities.

### Partners

- [Vodafone Australia](#)- Mobile operator in pre-commercial consortium
- [OzEmail](#) - ISP in pre-commercial consortium
- [Crown Castle](#)- Tower site owner in pre-commercial consortium
- [TCI](#) - Project manager in pre-commercial consortium

- [CommWorks](#) - Network equipment provider in pre-commercial consortium

Attention: We would like to know if Oz IT is useful to you. If information from this newsletter leads to a sale of signing of an agreement, please let us know!

Contact

[duncan.archibald@mail.doc.gov](mailto:duncan.archibald@mail.doc.gov)

## Australian Hi-Tech Crime Centre is Unveiled

A new government agency, designed to provide a national, coordinated approach to fighting multi-jurisdictional hi-tech crime has recently been opened in Canberra. The Australian Hi-Tech Crime Centre is hosted by the Australian Federal Police. The center will monitor and defend against hacking, online crime and fraud,. In addition it will provide education services aimed at preventing hi-tech crime through co-operation with law enforcement, government agencies, industry groups, and private organizations. The centre's Director is Alastair MacGibbon.

For more information go to [www.ahtcc.gov.au](http://www.ahtcc.gov.au)

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